

NH HMIS User Guide to Running the HIC (0629) in the Advanced Reporting Tool (ART)

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This User Guide provides information about:

- An overview of the Advanced Reporting Tool (ART)
- Accessing and running the HIC Report
- Tips on securing and protecting HMIS data and ServicePoint reports

Overview of the Advanced Reporting Tool (ART)

The Advanced Reporting Tool (ART) is part of Bowman System's ServicePoint 5.0 that allows Agencies to query data and create standard or customized reports for analysis that can help you assess the functionality and effectiveness of your respective Agencies. ART is also the tool used for creating funding and state requirement reports.

It is important to note that a copy of your live data is overwritten onto the ART servers once per day on a daily basis. This transfer is done at 12am.

IMPORTANT: Data in today's reports will always be from yesterday's data.

ART report results are always one day behind any changes you make in ServicePoint. So if you ran a report today, any changes you did today in ServicePoint would **NOT** show in the HIC report!

Prerequisites

Before running a report, you will need to:

Install Java - You will need to have a recent version of JAVA installed on your computer to run ART. JAVA is a very common freeware program and many computers will already have it installed, but the JAVA software can be downloaded for free from java.com if necessary. If you are unable to access ART, you will likely need to go back and install JAVA first.

Read documentation - Before trying to run your first report, you should read Bowman System's *ART Viewer License Guide (SP 5)* document that provides information about accessing, navigating, running, scheduling, saving, and printing reports. This document can be viewed from the HMIS website at <http://nh-hmis.org/content/hmis-report-training>.

Acquire an ART license - In order to use ART and run reports, you must be assigned a Reporting License by HMIS before you can log into the reporting tool. After you log into ServicePoint, you will see "ART: Connected" in the upper right corner of the screen if you are connected to ART. If you cannot access ART, to acquire an ART license, either:

- email the HMIS Help Desk at hmishelpdesk@nh-hmis.org, OR
- open a Ticket using the HMIS Ticket system from the tab at the top of the HMIS website www.nh-hmis.org or at <http://support.nh-hmis.org>.

Accessing the HIC (0629) Report

This report produces the HUD Housing Inventory Count required by HUD. The HIC is designed to accurately reflect each Continuum of Care's (CoC) capacity to house homeless and formerly homeless persons. The HIC is a complete inventory of Emergency Shelter, Transitional Housing, Safe Haven, Permanent Housing - Permanent Supportive Housing and Rapid Re-housing beds available in the CoC. The inventory should include all residential programs as described in HUD's HIC and PIT guidance released each year.

To access the HIC Report:

1. If you do not already have an active ServicePoint 5 ART license, email the HMIS Help Desk at hmishelpdesk@nh-hmis.org to acquire an ART license.
2. Open a browser and browse to the HMIS website www.nh-hmis.org.
3. Click the tab “Login to ServicePoint.” From the ServicePoint home page, log in with your Agency Administrator username and password.
4. Click on “ART: Connected” in the top right-hand corner of the screen to access ART. Alternatively, you can click on the arrow next to the Reports module on the left-hand side of the screen.
5. Click “ART” in the list of Reports to open the ART Browser window.
6. Click on the triangle to the left of “Public Folder” to expand the Public reports.
7. Click on the triangle to the left of “NewHampshireReports.”
8. Click on the triangle to the left of “HMIS Service Point Agencies.”
9. Click on the triangle to the left of “All HMIS Agencies General reports.”
10. Click on the triangle to the left of “HIC – Housing Inventory Count (0629).”

Figure 1 shows the ART folders and the location of the report and User Guide.

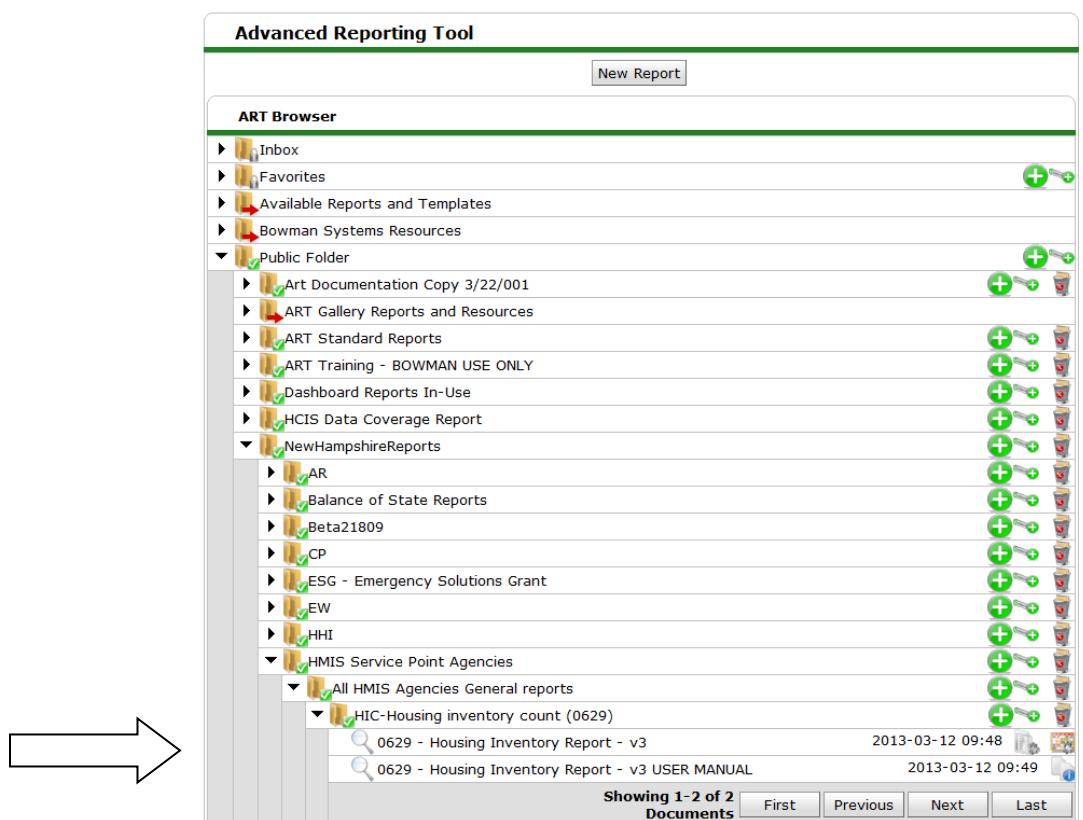


Figure 1: ART Directories and Folders to Access the HIC Report

Viewing the HIC (0629) Report User Manual

A User Manual for the report is located in the same directory as the report. The User Manual is a compliment to this User Guide and contains many more details about the report.

To view the User Guide:

1. Click on the magnifying glass to the left of the User Manual (see Figure 1).
2. Click the Download button to open or save the User Manual.

NH HMIS strongly suggests you use both the report and User Manual to assist you in running the HIC.

Running the HIC (0629) Report

Before running the HIC, you should read the HUD guide titled *2013 Housing Inventory Count and Point-in-Time of Homeless persons: Data Collection Guidance* that provides information about what data needs to be collected in order to successfully complete the HIC and PIT count. See the website <https://www.onecpd.info/resources/documents/2013HICandPITGuidance.pdf> to view this document.

To enter values and run the HIC report:

1. Follow the steps in section *Accessing the HIC (0629) Report* on page 4 to navigate to the HIC folder.
2. Click on the magnifying glass to the left of “0629 – Housing Inventory Count.”
3. Click on Edit Report button.
4. A prompt box displays that allows you to choose the criteria of your report, see Figure 2.

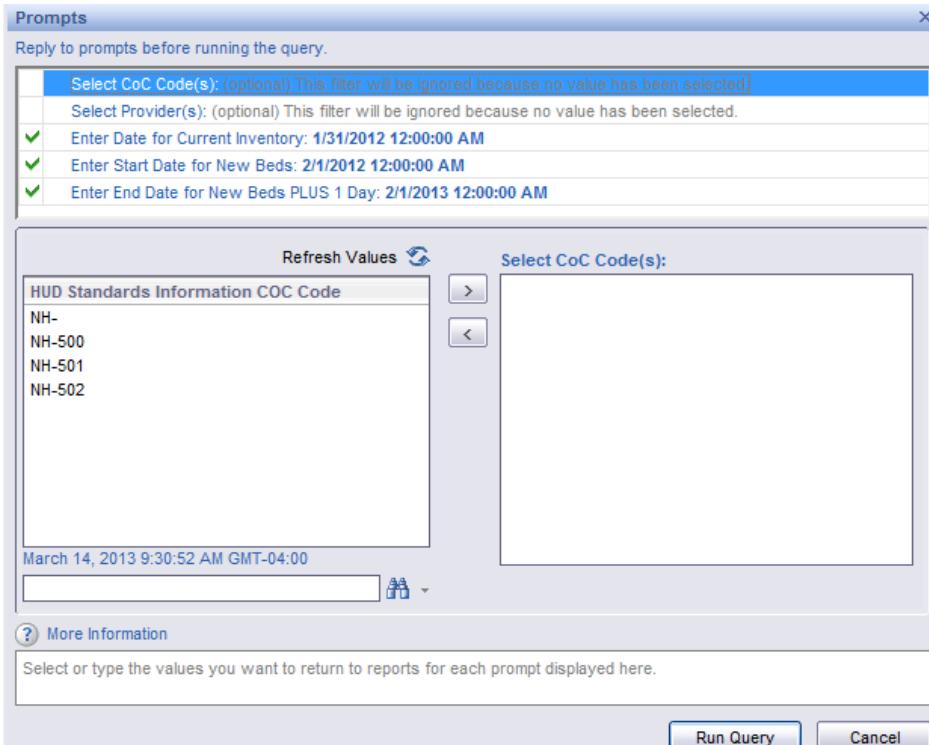


Figure 2: HIC Prompt Box

Click on each prompt to highlight it in blue and to view its possible values. Choose the following values and complete the query as follows:

- a. **Select CoC Code:** Skip. Leave set at “No Selected Value”. If there are already codes selected, use the left arrow (<) to send the choice back to the CoC Codes list. You do not want any values in the box on the right.
- b. **Select Provider(s):** If no values display, click on Refresh Values button. Select the Provider(s) from the list to highlight it in blue. Click the right arrow (>) to transfer the name(s) of the Provider(s) to the Select Providers box in the right.
- c. **Enter Date for Current Inventory:** This is the date designated by HUD as the Current Inventory Start Date. The report is set to default to the date for the HIC Report.
- d. **Enter Start Date for New Beds:** This is the date designated by HID as the Start Date for New Beds. The report is set to default to the date for the HIC Report.
- e. **Enter End Date for New Beds PLUS 1 Day:** Be sure to enter a date that is one day after the end of your report period.

5. When all the prompts have been answered, click the Run Query button at the bottom of the window to view your results. If a message displays, click the OK button to view your report.
6. If you get an error message, you will need to make changes in your data.
7. Save the report to your computer by clicking “Document” in the top left-hand corner of the report.
8. Click “Save to my computer as” (NOT “Save report to my computer as”) and select PDF format. PDF is the format that Bowman Systems recommends for reports. For more information about handling data and reports, see *Security and Procedures Related to Data and Reports* later in this guide.
9. Wait for the “File Download” dialog box to appear (this can take a minute or two).
10. Now you have a choice as whether to “open” the document and (and then print it) or to “save” the document to your computer under a name and location that you specify.

TIP: If the “File Download” dialog box fails to appear in step 9, this is most likely due to a pop-up blocker. You can temporarily disable your pop-up blocker by holding down the control (Ctrl) key. Repeat steps 1-3 while holding down the “Ctrl” key, and it should work.

Security and Procedures Related to Data and Reports

It's unfortunate, but identity theft is happening every day. That's why it's up to us to protect HMIS data and ServicePoint reports. We have access to confidential client data – names, date of birth, social security number, and more. We are responsible for keeping that private for our clients.

You can feel comfortable that the data stored in ServicePoint and the data stream to the Bowman Data center is secure. More and more, we are seeing it is the data that is not in the data center that is the privacy risk.

The data security magazine "Darkreading" recently reported that Boston Children's Hospital has had a potential breach stemming from a laptop stolen at a conference. From that laptop, a file was emailed which contained the names, medical record numbers, birth dates, diagnoses, and procedure surgery dates for 2,159 patients.

Neil Roiter, research director at Corero Network Security, says, "There have been numerous recent cases across the country involving lost or stolen laptops, missing backup media, and poorly secured health record databases involving tens, even hundreds of thousands of records."

This is a good reminder that we should always be careful with our client data! Below are some basic rules to follow and keep in mind to keep all data secure:

- **Emails** - Never include client names or social security numbers in an email. Once the email leaves your machine, you have no idea where it will end up or who will see it.
- **Transfer of Data** – Do not use a USB memory drive to transfer client-specific information UNLESS the file containing that data is encrypted so that should the drive containing it be lost or stolen no one could access the data.
- **Hardcopy Paper Records** – It's not just electronic records that can be lost, or stolen, or fall into the "wrong" hands. HMIS information in hardcopy format should be disposed of properly. Be sure to use the same care to secure paper records containing client information as you do with electronic records. This may include shredding finely enough to ensure that the information is unrecoverable.
- **Data Access** - Since no ServicePoint data is stored on the local computer, the physical vulnerability of agency computers does not constitute a significant threat to client confidentiality. However, any user access data, such as a password, that is stored on a computer or in a written file, does constitute a risk to client confidentiality.
- **Unattended Active Sessions** - Users who have logged on to HMIS and have an active session should never leave their computer terminal unattended. The system does have an automatic log off feature. If you are leaving your terminal for any period of time, log off the active HMIS session.

- **Locally-Saved Data** - Users who have been granted access to report and query functions have the ability to download and save client data onto their local computer. All client records containing identifying information that are stored within the participating agency's local computers are the responsibility of the participating agency. Agencies should develop protocol regarding the handling and protection of data downloaded.
- **Data Disposal** - Dispose of documents that contain identifiable client level data by shredding paper records, deleting any information from disk before disposal, and deleting any copies of client level data from the hard drive of any machine before transfer or disposal of property. Agencies must establish internal access to data protocols. These policies should include who has access, for what purpose, and how they can transmit this information. Issues to be addressed include storage, transmission and disposal of data.
- **Printed documents** - Printed versions of confidential data should not be copied or left unattended and open to unauthorized access.
- **Sharing data** - Media containing client-identified data will not be shared with any Agency other than the owner of the data for any reason. Authorized employees using methods deemed appropriate by the participating Agency may transport HMIS data that meets the above standard. Reasonable care should be used, and media should be secured when left unattended.
- **Destroying data** - Media containing HMIS data that is released and/or disposed of from the Agency and Central Server should first be processed to destroy any data residing on that media. Formatting and overwriting are acceptable methods of destroying data.

It's up to you to ensure that your data is secure!